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ABSTRACT

This sourcebook is a collection of some planning workshop ideas and tools that have been used by organizers of charter school workshops in a number of states. The purpose of the sourcebook is to help organizations assist potential charter school founders in their school planning through the application, chartering, and approval processes. The first section, "Designing and Organizing Effective Workshops," walks the workshop organizers through a step-by-step process for designing workshops to teach charter school founders how to plan the startup of a charter school. Selecting topics, recruiting speakers, choosing materials and presentation strategies, scheduling, and marketing the workshops are discussed. The second section, "Workshop Topics and Materials" contains: (1) a model workshop series; (2) a list of possible speakers; (3) workshop organizer tools and materials; (4) a list workshop topics and materials included in the full 500-page sourcebook; and (5) materials on each topic collected from 6 organizations that have conducted similar workshops in their own states. (SLD)

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CHARTER FRIENDS
NATIONAL NETWORK
connecting and supporting state-level charter school initiatives

A Sourcebook for Organizers of

Charter School Planning Workshops

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Jen Schroeder
Charter Friends Nat. Network

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An Introduction to This Source Book

The planning and start-up phases of a charter school, like those of any successful small enterprise, require tremendous energy, thoughtful planning and determination to overcome obstacles. A key lesson learned from early charter school experiences is that effective planning during the application and chartering period can help reduce the number and size of obstacles that start-up schools face in the first year of operation. The less time new charter school leaders spend fighting avoidable fires, the more they may focus on achieving the mission of their school.

Responding to this and similar needs, a variety of support organizations have sprung up in many states to assist charter schools. Support organizations may include independent charter school resource centers, associations of charter schools, and others. These organizations can help charter school applicants significantly by *making the planning process more structured, clear, and focused on real school management concerns* . Many such organizations have organized "planning workshops" to assist potential charter applicants.

The Charter Friends National Network is pleased to present *this Sourcebook for Organizers of Charter School Planning Workshops,* a collection of some of the best planning workshop ideas and tools that have previously used in a number of states. The purpose of this Sourcebook is to help organizations in *any state* organize *workshops to assist potential charter school founders* with the planning phase of their schools. The "planning phase" includes the range of time between potential charter school founders' first sparks of inspiration, through the application, chartering and approval process. Much of this planning phase will lay the groundwork for the flurry of decisions and activity needed to open the

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doors of a new school (or to re-open an existing school that has converted to charter status).

This Sourcebook reflects the experience of six organizations formed to support charter schools (in five states and Washington, D.C.). Representatives from each of these resource centers generously shared their materials, ideas and lessons based on workshops they have organized. Initiatives and organizations that contributed materials and ideas were:

- John Ayers and Margaret Lin - Leadership for Quality Education, Chicago, IL
- Linda Brown - Massachusetts Charter School Resource Center, Boston, MA
- Ken Campbell and Shirley Monastra - The D.C. Committee on Public Education (COPE), Washington, DC
- Eric Premack and Laurie Gardner - Institute for Education Reform, Sacramento, CA
- Jeremy Resnick and Bruce Barron - Charter Schools Project at Duquesne University, Pittsburgh, PA
- Sarah Tantillo - New Jersey Charter School Resource Center, New Brunswick, NJ

The full 500-page version of this Sourcebook is available for $30.00 (including shipping and handling) from the Friends Network - info@charterfriends.org The full version includes hundred of pages of materials provided by the above six organizations. Following is an abbreviated version of the Sourcebook, including a list of speakers recommended and used by these established charter school resource centers.

How to use this Sourcebook

This Sourcebook is designed both to save time and to help plan effective workshops.

- *If you have never organized a planning workshop* , you should read each part of the Sourcebook carefully to find a host of advice from experienced organizers about content and logistics of workshops.
- *If you are an experienced organizer* , refer directly to sections of particular interest to you (or consider using the detailed advice to delegate some of the organizing to less experienced colleagues).

The Sourcebook is divided into two major sections:

Section One: Designing and Organizing Effective Workshops

This section walks the workshop organizer through a *step-by-step process for designing workshops* to teach Charter School founders how to plan the start-up of a charter school. The format of this section is designed to help quickly identify key action steps and includes space to add your own notes. Drawing on the experiences of others who have organized similar workshops, this section will help with key decisions and activities needed to deliver

workshops, including:

- Selecting topics to cover
- Recruiting speakers and faculty for each topic
- Choosing the best materials for each topic
- Selecting presentation strategies
- Scheduling, logistical and other planning tips
- Marketing your workshops

Section Two: Workshop Topics and Materials

This section contains:

- A model workshop series
- A list of possible speakers
- Workshop Organizer Tools and Materials
- Workshop Topics and Materials (a listing of the materials included in the full 500-page Sourcebook)
    1. General Planning Tools and Materials
    2. Mission and Vision
    3. Assessment and Accountability
    4. Governance
    5. Legal Issues
    6. Finance
    7. Curriculum and Instruction
    8. Staffing

9. Facilities
10. Parent and Community Relations
11. Enrollment
12. Special Education

- *Materials on each topic* collected from six organizations that have conducted similar workshops in their own states.

Section I: Designing and Organizing Effective Workshops

Part A: Introduction and Overview

One of the biggest barriers most charter applicant's face is the fact that there are a number of *decisions to make and so many problems to solve* before the school doors ever open. When you host a charter school-planning workshop, you are bringing potential school founders into a community of people with a similar agenda: to improve the education our children receive. Applicants who stay the course will benefit tremendously from the people they meet in workshops (including staff of your organization) who may be sources of critical information or assistance at various points in the planning and organizing process. Good planning on *your* part will help make workshops *informative and energizing forums for learning and meeting people* .

Section I of the Sourcebook walks you through the issues you should consider and the decisions you will need to make as you plan your workshops. It is written to apply across states, regardless of charter law specifics. *It assumes that you have already made yourself familiar with the requirements and timing issues prescribed by your state's laws and regulations* .

✂ Review Charter Legislation

As you walk through each part of this section, make a note of specific requirements in your state to decide what content or logistical issues must be dictated locally. In those areas where your state's law leaves you flexible to use "best practices" from other states, you can incorporate the wisdom of your peers as it appears here.

The issues addressed in this Section include:

- Selecting *topics* to cover,
- Recruiting *speakers and faculty* for each topic,
- Choosing the best *materials* for each topic,
- Selecting *presentation strategies* ,
- Scheduling, logistical and other *planning tips*, and
- *Marketing* your workshops.

Part B: Step-by-Step Workshop Planner

1. Selecting Topics to Cover

Leading-edge workshop organizers are moving away from presenting planning topics as discrete issues and making the workshops more of a "business planning" series aimed at helping participants produce a comprehensive action plan that will carry schools through their first year of operation.

Rather than treating the application process as an administrative step, the plans that charter school organizers develop for the application should be thorough enough to serve as action plans for the next stage after the charter is signed .

While the focus for potential school founders will need to be on nuts-and-bolts, workshop organizers and presenters must be clear about how the nuts-and-bolts fit together to form a smooth running machine. Presenting each topic within the context of creating a comprehensive operating plan will help prospective applicants understand how important each issue is to starting and operating a great school.

If you have framed each of the planning workshop topics in this way, teachers who want to organize a school will understand how critical finances and facilities are to educational success. Parents will come to understand how challenging it is to formulate a complete instructional plan. Entrepreneurs will see the complexity of managing parent and community relations. Each potential applicant will see not only how their strengths will help them run a school, but also how their weaknesses may need to be addressed to ensure a great education for students.

Regardless of the framework you use to present topics, prospective charter applicants in most states will need to deal with similar planning issues. The major topics that you will typically need to address include:

- General Organization Planning

- Charter School Laws
- Mission and Vision
- Assessment and Accountability
- Governance
- Legal Issues
- Finance
- Curriculum and Instruction
- Staffing
- Facilities
- Student, Parent and Community Relations
- Enrollment
- Special Education

This is not an exhaustive list. But these are the most common and critical topics presented by most organizations surveyed. And your audience will need to know at least something about each of these topics.

What will vary significantly is *how much of each topic is dictated by state charter laws* and *what local issues need emphasis*. If charter schools in your state are required to use the budgeting format and financial accounting system of local school districts, then your workshop on financial planning needs to teach applicants how to develop financial plans that conform to that system. If all of your state's charter schools are conversions from existing schools, then finding facilities is not going to be a concern of founders. Similarly, if your state's population is heavily urban, then you may want to include a session on special issues of urban schools (or weave this issue through all of your sessions). Thus, your *workshop content should reflect the local restrictions and issues charter applicants' face in your state or area* .

✂ List locally determined topics

The more locally determined a topic is, the more likely that you will need to create your own materials for your planning workshops. You may find the chartering agency helpful, but more than likely, you will need either to develop your own materials or to coax local professionals into learning the charter school laws and preparing customized materials for you. (Later we will talk more about getting help from local experts.)

✂ Note topics with few restrictions

You also will want to *consider what other training resources are readily available to potential school founders* . For example, if your state has a nonprofit resource center that has good workshops or materials (e.g., on fundraising or governance), you may consider referring applicants to these (or adopting these materials for your own workshops). Often, such organizations are excellent sources of practical advice--particularly if you are willing to spend time with their staff to help them become familiar with charter school laws and concepts. ✂ Identify local training resources

✂ Begin seeking/creating tools for

locally determined topics

Consider adopting a "business plan" framework: encourage participants to create a comprehensive and cohesive start-up and first year plan for their school . Try not to let your audience settle for planning just enough to complete the technical requirements of a charter application. This does not mean that your workshops need to delve into excruciating detail. Extremely narrow and lengthy workshops often serve as a "wet towel" and dampen, rather than inspire, quality charter design and planning efforts. Instead aim to provide the framework, tools and additional resources that school founders need to plan effectively. *Try to strike a balance between inspiring charter school applicants and providing a dose of reality about the challenges of starting and managing a school.*

✂ See Section II, Part B, General

Charter School Planning Tool

2. Recruiting and Preparing Speakers for Each Topic

If a picture is worth a thousand words, a great presenter is worth at least that many manuals and books. That's what it's important that you find presenters for your workshops who:

- know about specific planning topics,
- articulate how their topics link with other planning issues,
- understand charter schools, and
- can engage an audience

✂ Determine your faculty budget

Finding all these characteristics in speakers may be challenging, but it is a great investment of your time to find them if you can. Most charter school applicants are going to be pressed for time and challenged by the myriad of decisions they face. The inspiration and understanding a good teacher creates will go a long way toward speeding and strengthening participants' applications and organization plans.

Where can you find good teachers for charter applicants? The sources are numerous, often local, and dependent upon your organization's ability to network and partner with others in your community. Some sources of presenters to consider include the following:

✂ Identify sources of speakers

- Local professional associations (e.g., attorneys, CPAs, architects)
- Your own organization
- Individuals who serve on your organization's board (or their colleagues and friends)
- Existing charter school operators in your state
- Charter school operators from other states
- Leaders of charter school resource centers in other states
- Independent consultants or professionals
- Nonprofit support center leaders or staff
- Leaders of successful local public and private schools
- Local funders (community development financial institutions, venture capital groups, foundations)
- Local civic organizations
- Vocal charter school "converts" who are newly sold on the idea
- Articulate students from successful charter schools who can offer "testimonials" about attending charter schools ✂ Use your organization's network

Keep in mind that even speakers with general knowledge may be more suited for some topics than others. Private school staff, for example, may not be familiar with the open admissions processes required by most charter laws. On the other hand, many governance and leadership issues may be similar. You may need to invest a bit of effort in bringing all presenters up-to-speed on the specifics of your state's laws and processes.

Most organizations surveyed believe it is a challenge for even the best- intentioned representatives of existing school systems and state departments of education to be a good faculty for charter planning workshops. The start-up management needs of charter schools are very different from the ongoing administrative needs of a school operating within a larger system's rules. However, staff from "alternative" public schools or state department or district personnel with reputations for thinking "outside of the box" may be very helpful presenters. And even those with a traditional approach may be used as "just- the- facts" presenters on topics where adherence to existing regulations is required.

✂ "Interview" speaker candidates

Other tips offered for choosing speakers include:

- Get local professionals to speak for free as marketing for their services
- Whether you use local or outside speakers will depend both on your budget and how much of a particular topic is driven by local charter laws
- Use local talent if you have it -- it's less expensive and available to school leaders later if needed
- Charter school operators may prefer a donation to their school in lieu of a speaker fee
- If substitutes to your first choice speakers are offered, ask about their comfort and success *presenting* as well as their *technical* knowledge
- Pairs of speakers may work better than single speakers, because the audience hears different perspectives, and a more interesting dialogue can be created
- Consider assembling small groups of professionals interested in helping charter schools; educate them all at once about charter issues to create a speakers pool for yourself
- Speakers' schedules change; have a backup person in mind, just in case.

You may decide that you would like to bring in out-of-state speakers for certain topics. For example if your state is beginning its first round of charter applications, you may not have the best expertise on some topics within your state.

✂ Identify topics best addressed

by non-local talent

Assuming you have funds for travel expenses (and, in some cases, for consulting/speaker fees), you will want to choose your out-of-state speakers wisely to ensure that the investment is worthwhile. Keep in mind that an out-of-state speaker is less likely to be a readily available resource to individual schools later. Also, charter school laws vary from state to state; experience in another state may or may not be relevant in your state.

These warnings aside, some of the best-informed and motivating faculty for your workshop may be available in a nearby state. The organizations surveyed were each asked for a "best-of-the-best" speaker's list -- people who may very well be worth the additional effort and expense to bring to your state for a workshop. In Section II, Part A, you will find the names and phone numbers of speakers mentioned by the organizations contributing to this Sourcebook. The list is not exhaustive and new dynamos are appearing on the scene all the

time, so keep your ears open and use your network to stay abreast of other possible speakers for your workshops.

✂ Identify non-local faculty who meet your need and budget

Once you have lined up your speakers, it is your responsibility to help prepare them to make a great presentation. Tips

for preparing your speakers include:

Give your speakers "talking points" or "specific questions" that note key points to cover and information about how to

tie their topic to rest of the workshops

- Don't be shy about following up with speakers to ensure the presentations they are planning are on the right track or respond to questions and issues that come up at an earlier workshop
- Help your speakers tailor their expertise to the charter school context
- Offer to copy handout materials for speakers so they may focus preparation time on content
- Alert speakers to likely questions and ask them to prepare ahead for these
- Let speakers know that the experience level of participants may vary widely; ask them to cover major points and to be prepared with handouts for the less experienced audience members
- Limit time for lecture to 20 - 30 minutes on most topics; ask speakers to prepare accordingly and let them know that a moderator will open the floor to questions after this time has expired
- Let speakers know that they are not expected to know all the answers (especially if charter schools are new to your state); tell them to point out gray areas in their presentation
- If you have more than one presenter for a given session, have them discuss and plan together in advance of the presentation
- All speakers need to understand how their topics apply to charter schools ✂ Prepare each speaker
- Provide your speakers with the agenda for the entire workshop so that they know how

their presentation fits into the overall program

3. Choosing the Best Materials for Each Topic

The materials you choose will serve several purposes, including:

- Providing overviews of key issues and potential pitfalls
- Serving as specific planning tools for the application process, start-up phase and first-year operations
- Giving examples of how other schools have planned for their first year

A collection of some of the best materials currently available is assembled in Section II of this Sourcebook. On topics where your state's legislation is prescriptive, you will need to generate your own materials. Even in areas where charter schools in your state are free to use best practices, you may think of materials and tools additional to the ones presented in Section II. If using materials from other states or organizations, you may want to develop brief memos outlining any major differences in state laws or other circumstances that school founders in your state need to know.

✂ Identify available tools by topic

Other tools and materials that you should add to the mix are:

- A copy of your state's charter law
- A short summary of your state's charter law that lists core requirements and refers to key sections of the law
- Copies of charter application forms or requests-for-proposals
- "Templates," or blank copies of key planning materials that participants may complete for themselves (examples include by-laws and financial planning tools); but emphasize that the content filled in by each school will vary, and any legal documents should be reviewed by their attorney

✂ List/make additional tools needed

For the topics where you will need to create or find materials in addition to the ones presented in Section II, *use some of the same sources for materials that you used for your faculty* .

Many workshop organizers have simply asked speakers to bring their own materials and tools to share. The downside of this approach is that these materials may not be available to you after the workshop, and you have less control over quality unless you see materials in advance. Even so, most speakers will use at least some of their own materials in the form of overheads or other presentation tools. Ask in advance which materials you may keep for later use. Encourage speakers to write down their main points in a presentation format that also may be distributed to participants (e.g., bulleted overheads).

Keep in mind that you can economize greatly by limiting bulky handouts that will be used outside of the workshop to one per school group, rather than one per person. Posting materials on a web site is another increasingly accessible and simple option that can significantly reduce your printing and postage costs.

You also may want to take notes and make a workshop summary to distribute to people unable to attend a particular session, so they may get the flavor of the presentation and discussion. If you do not have a reliable, dedicated note-taker on hand, consider videotaping your session and providing copies for a small fee.

✂ For each topic, identify tools on hand,

including:

- overview and

- planning tools

✂ Identify additional materials needed

✂ Make a plan for obtaining or creating

additional materials needed:

- Where will you look for examples?

- Who will create new materials?

- When do you need drafts and finals?

✂ Plan for note taking or video of sessions

4. Selecting the Best Presentation Strategies

The most interesting topic can be made dull even by the brightest, most expert presenters. And the most dry of topics can come to life when presented in an engaging format.

Most workshop organizers have relied heavily on presenters' creativity for making presentations and discussions come alive, and most have followed fairly traditional lecture plus discussion formats. For the most part, this format has served to communicate key information clearly and efficiently.

However, most of the experienced workshop organizers we interviewed believe there is room for improvement in this area. If you have time and inclination to "raise the bar," here are some starter tips from experienced organizers:

- Begin each session with something inspirational and motivating, whether it is an inspiring video, a quote from an education leader or a short charter school success story ideally told by a teacher, parent or student
- Consider having role plays on topics like governance and special education where human interactions are critical (role plays should address major issues in the topic)
- Try a "Socratic Dialogue" method of role play (see Section II, A for a planning tool)
- Consider teleconferencing, if facilities are available, to reduce participant travel time or to make the most of expensive speakers
- On topics where opinions differ significantly, consider using a panel format with multiple speakers who have 5 - 10 minutes each to present their views
- Consider videotaping sessions so that those who miss a workshop can make it up later
- Have participants do preparatory work before workshops so they will have more focused and practical questions (this avoids many follow-up phone calls, as well)
- Set aside time in the *middle* of each session for potential applicants to talk with each other

✂ Determine presentation format

Group exercises have received mixed reviews. They are engaging but time-consuming. Use them if you have time and if your goal is to get founders to practice team planning.

If you want to stick with the basics, you can fall back on the typical format described below:

- Presenters are limited to 20 - 30 minutes of lecture
- Then the floor is open for questions as well as discussion among participants
- A moderator (usually one of the organizers) is responsible for intervening if discussions become too focused on issues relevant only to a small number of participants (suggest one-on-one follow-up)

✂ Communicate format to speakers

For more about planning the overall timing of your workshops, see the next part of this section.

✂ Identify workshop moderator

5. Scheduling, Logistical and Other Planning Tips

Scheduling and logistical planning are essential to delivering a great workshop. If you have limited experience (or just want to learn from others' experiences), read the following. Planning issues you will need to address include:

- Timing and sequence of sessions
- Location
- Attendance fees
- Food/Refreshments
- Equipment (overhead, flip charts, etc.)
- Number of participants
- Other issues

Timing: After you know what information you want to deliver, you can begin to package the topics in a way that meets the timing needs of charter applicants in your states. Some factors that might impact timing are the application deadlines in your state, the charter negotiation process, and the sequence of decisions that need to occur.

Organizations have scheduled workshops in a variety of ways, ranging from one-day sessions (hitting on all major topics) to a half-day per month (1-2 topics per session) over a year's time.

Most organizers have opted to deliver workshops on Saturday mornings, to accommodate school developers who have teaching or other jobs. They are typically scheduled between 8 - 12:00 noon. Anything over 2 hours needs to include a break. Alternatives include weeknights and days when school is not in session. School holidays might work better in some states than in others and would not be convenient for most non-teachers. Organizers agree that you generally should avoid holding a workshop at any time when teachers are in school, since teachers are a key group of charter school founders. If you are flying in a speaker for multiple topics, you may need to rearrange sessions to avoid paying for travel expenses twice. To reduce airfare, consider asking speakers if a Saturday night stay-over is possible.

Shorter, more frequent sessions are more of a travel burden for those coming from other parts of your state. On the other hand, packing too much into one day means that those who cannot attend that particular day have missed a great deal of information. You will need to strike the right balance based on your state's particular needs, perhaps determined through an informal

phone survey of a few prospective attendees

A couple of other tips about the sequencing of sessions::

- Leave time in the day for participants to get to know one another. Your workshop can help forge a network that helps planners long after they leave. Consider having participants arrive early for coffee and rolls or muffins (the least expensive meal to fund) or stay for lunch (brown bag if your finances are a constraint).

- If your attendance is under 40 people, have all participants attend the same session (rather than rotating sessions). Doing so allows presenters in later sessions to build on earlier ones rather than repeating important information.

- If you expect larger numbers of people, consider rotating people through sessions to keep the number under 30 per group. This allows for better participation.

✂ Decide timing, sequence of topics

Location: The location of your workshop should be planned around several factors, including:

- Distance participants must travel (long distance begs for a hotel or site near reasonably-priced hotels)

- Distance speakers must travel

- Traffic patterns at times of day people will be arriving and leaving

- Parking availability and cost

- Access to public transportation

- Size and cost of facilities

- Equipment available on site and rental costs

- Catering or other services you might need

Examples of sites that others have used include university classrooms, lecture halls and student unions; hotels; regional education service centers; existing charter schools; and other schools. Typically, the goal is to minimize the inconvenience to the greatest number of people. Consider also that locating near the majority of speakers may reduce your organization's travel costs. Check into the added cost of presentation equipment you may need.

Also consider space needed for meals and small group sessions, if any. Hotels may offer free conference rooms if an agreed-upon number of rooms are rented by attendees. Unfortunately,

the cost of food and audiovisual services in hotels is usually very high.

✂ Reserve facility

Attendance Fees: Most workshop planners have charged no fee or a very limited fee to cover costs of food and materials. But others argue that charging a fee encourages participants to take the workshops seriously and to attend all of the sessions (making discussions more coherent). Whether or not your organization charges an attendance fee may depend upon your mission, the cost of facilities and speakers available to you, the financial resources you have, and the resources available to potential applicants. The range of fees charged is broad, from about $40 to $300 for a complete workshop series. Some have charged sliding scale fees or offered "scholarships" dependent upon ability to pay.

✂ Determine fees you will charge

Food/Refreshments: The wisdom of experienced organizers about whether or not to feed participants varies. Some say it is a significant cost that can be eliminated. Others say that this is a valuable time for applicants to get to know each other and the speakers. You will need to decide based on the timing of your workshops, cost and your finances. At some facilities, you may simply bring your own food and beverages (e.g., bagels and orange juice and coffee for breakfast); others require you to use their catering services.

✂ Plan for food, refreshments

Equipment: If you have your own equipment, you will need to weigh the savings/inconvenience of bringing it with you against the cost/convenience of renting it at the facility you are using. Again hotels may require you to use their own, often very expensive, AV equipment.

✂ Reserve equipment

Number of Participants: Generally speaking, organizers have not tried to limit the number of participants and have had a wide range in number of people per workshop. You should ask participants to RSVP, perhaps separately for each session if they are spread apart.

This will help you ensure that the space you have reserved is adequate and that enough handouts and refreshments are available. Often a few extras will show up, so plan for this.

✂ Include RSVP request

in marketing materials

Other Issues: Below are other tips for organizing your workshop:

- Put all handouts in a folder for each participant. Include a list of additional resources such as helpful state agencies, local civic organizations and volunteer consulting services. (Screen in advance to ensure that the resources are actually helpful.)

- Consider providing for sale any critical books or other materials school founders might

need (have receipts on hand, too).

- Provide name tags for all participants and speakers.
- Have participants sign in and provide mailing addresses or other information you might need later, especially if you anticipate walk-ins.
- Make sure your workshop facility is well signed so participants can find the room where you are meeting.
- Provide water for speakers.
- Post speakers' names where they are visible during each session (e.g., using "table tents").

6. Marketing Your Workshops

You know what topics you will cover, you have speakers in mind, you've selected the best materials, and you know when and where your workshops will happen. *Now what?*

Now it's time to put on your marketing hat! Marketing a charter school-planning workshop can have extra challenges, because many potential school founders are only minimally aware of the opportunity. Many have heard of charter schools, but may not know that this is a viable option for them. So, *your first job often becomes educating people about the opportunities* created under your state's laws. If charters have been around your state for a while, this is less of a challenge.

Many planning workshop organizers *have marketed to a very broad group* of civic, business, education and nonprofit contacts *initially* . The purpose of the broad- based approach is typically just to inform people of the charter school opportunity. Before launching a series of more detailed workshops for serious school planners, some states have held introductory sessions explaining what a charter school is and the key points of that state's law. Other states have organized large charter school conferences to share best practices from states where charters already exist; the conference is used as both an education and marketing tool to identify potential school founders. One organization held small introductory sessions around the state to make people aware of the charter opportunity. Another used an informal "fair" to expose people to the charter idea and other potential applicants. Some organizers dive right in and try to attract people to the first workshop directly.

✂ Consider a pre-workshop event

Regardless of the event you use to attract people initially, you will need to generate a significant mailing list that includes keys members of the community who might know potential charter operators or who might be interested in becoming a charter school founder themselves. Your list should include some healthy combination of the following:

✂ Develop mailing list to advertise

pre-event & workshops

- Nonprofit and "grassroots" organizations in your state
- Youth-serving and social service agencies
- Teachers' organizations (councils of social studies, math, etc)
- Organizations of alternative schools or educators
- Key business organizations and leaders
- Foundations
- Applicants for any charter school planning grants that may be available in your state
- People who have requested information about charter schools from your state department of education or chartering entities
- Superintendents and principals
- School Board members and/or chairs
- Existing charter school operators (who may get calls from potential applicants)
- Private school operators
- Child care operators
- Community college or vocational education leaders
- Businesses that provide contract services to existing public schools
- United Way mailing lists
- Local think tanks or policy groups (across the political spectrum)
- Anyone who calls your organization for information
- Colleges and universities
- Community development corporations
- Museums
- Applicants who were turned down in previous years
- For-profit school management firms
- Your organization's own current mailing list

- Other organizations' mailing lists (or subsets of their lists)

Your main goal should be to notify anyone who might be a potential school founder about the planning workshops.

✂ Prepare and distribute mailing

Most organizers agree that you need not be as broad-based in your marketing after charter schools are somewhat more established in your state. Your organization will become known and you will receive calls requesting information about your workshops. For a second round of workshops, you may want to limit your marketing to a much smaller group.

In addition to mailings, some groups have used a combination of other marketing efforts, including:

✂ Use additional marketing tactics

- Follow-up calls to key targeted groups likely to produce strong charter school founders
- An article or advertisement in your organization's newsletter (or another related organization's newsletter)
- Press releases to newspapers (including smaller community papers) and other appropriate media
- Announcements on local National Public Radio affiliates
- Public service announcements on commercial TV, cable outlets and radio stations
- Advertisements on your organization's website, electronic mail listservs or sites of related organizations
- Presentations to community, education and business groups

✂ Create an agenda that sells

One key tool that many organizers have used to market their workshops is a snappy agenda. What's so unusual about an agenda for a charter school-planning workshop? In content, not much. But if your organization is like several others that have been successful in attracting participants, *your agenda will be one of your key marketing tools* . It will be a one-page, easy-to-copy-and-share summary of what you are offering to prospective charter applicants in your planning workshop.

If you do not have any other written advertisement for your workshops, then it will be especially important for your agenda to be clear and engaging. This is the first "face" of your organization that many prospective attendees will see. *A really great agenda will make it*

clear that your organization knows what matters to potential charter applicants and knows how to be organized, thorough and relevant .

Your agenda will reflect the decisions you make about the content and logistics of your workshop. The basics of a good agenda for a charter school-planning workshop are similar to the basics for any agenda. A clear, stand-alone agenda should include at least the following information:

- Topics that will be addressed (a title and brief description),
- Time allotted to each topic,
- Speaker(s) presenting/leading the discussion for each topic,
- Timing of breaks or meals and whether refreshments are provided,
- Date and location (street address and, if available, facility phone number)
- Total timeframe for each workshop
- Fees for attendance, if any,
- Name(s) of sponsoring groups,
- Phone and fax numbers, e-mail and/or mail address for registration.

In Section II, A, we have included some sample workshop agendas that have served both a marketing function and a traditional time- management role. Consider making copies on colored paper so that your agenda will stand out.

Section II: Workshop Topics and Materials

Part A: Introduction and Materials for the Workshop Organizer

This section is written to help you quickly identify tools and materials that you may use in your planning workshops. First, in Part A you will find materials to help you, the workshop organizer. Then, in Part B you will find a summary list of topics, followed by materials that will help you and your workshop speakers provide information on each topic.

Most of the materials included in this Sourcebook were developed for charter school applicants in specific states. Thus, even materials that are applicable to many states generally will contain references to state-specific information. However, these materials were chosen in part because they contain information that will be helpful to potential school operators in other states, as well.

You will need to decide whether to modify the materials here or copy them as is for use in

your state. Either way, having these materials as a starting point should reduce the time you spend organizing and should add value to your planning workshops.

1. Model Charter School Planning Workshop Series

There is no one best workshop series that will work in all states because the charter legislation, educational, and timing issues vary from state to state. (Even very experienced workshop organizers have differing opinions about the specifics.) Section I was designed to help you consider all of the variables that might impact how you design and deliver workshops in your location. *You will need to determine how much time to devote, how much customization to do, and what order to follow for the topics in your state.*

The model workshop series outline on the following pages should be considered a *starting point* for planning workshop organizers. All tools and materials referenced in the outline are contained in Section II, Part B.

Workshop 1: Planning and Running a Strong Charter School and

The Charter School Opportunity in Our State

> *Premise: Most potential charter school founders are unaware of the complexity and challenges of operating a strong school. This workshop is aimed at inspiring the participants, communicating the basic framework of your state's charter laws and helping potential founders quickly recognize areas where they may need help.*

1. Goals: To answer the following questions.

> How can charter schools make a difference for children?
>
> What is the charter school opportunity in my state?
>
> Why do some individuals and organizations oppose charter schools?
>
> What skills do my team and I need? How can I build a strong team?
>
> What does my charter school business plan need to include to help me actually start and run a school?
>
> What/who else do I need to help me start and run a charter school?

2. Process:

> Speaker from existing charter school about successes,

challenges.

Overview of major start-up and operational issues facing charter schools.

Summary of charter school law in this state -- key areas of freedom and constraints.

Participants individually (or as school team) self-assess their skill level in each operational and business planning area.

Participants discuss ways to compensate for areas of weakness.

Participants commit to rounding out teams and finding additional resources.

Speaker emphasizes importance of sound operational plan, including:

- Ensure school management practices support educational goals

- Allow school leaders to make more principled, and fewer seat-of-the-pants decisions

- Communicate school "blueprint" to staff, board, parents and others

- Mitigate typical year 1 crises such as cash flow, staff turnover, special education, and governance confusion

- Make delegation of key action steps easier

3. Tools/Materials from *General Planning Tools and Materials* section.

Summary and copy of states charter school law and application materials.

Time Required: 4 hours

Workshop 2: Defining Your School's Educational Mission and Vision

Assessment and Accountability

Premise: The operational plan for starting and running a charter school should flow from the educational mission and vision of the founders. Likewise the results produced by the school should reflect its

mission/vision. This workshop is designed to help participants articulate the fundamental *purpose* of their schools and begin planning the measures and standards of success to which they will be held accountable in their charters. These goals and measures will lay the groundwork for making a detailed start-up and operational plan (which in turn provides the content for completing the charter application).

1. Goals:

To help participants begin articulating their mission/vision with enough clarity that they may *communicate* it to others *and use it as a yardstick* to test the appropriateness of their operational plan.

To help participants begin defining the measures and standards for success in their schools.

2. Process:

Speaker to present fundamentals of articulating a mission/vision.

Provide and discuss examples of mission/vision statements and how an operational plan might differ for two different visions.

Optional: participants to begin crafting mission/vision statements and discuss challenges.

Presentation and discussion of different approaches to assessment and accountability plans and how they support different missions/visions for schools.

3. Tools Materials from *Mission and Vision* section.

Tools/materials from *Assessment and Accountability* section.

Time required: 4 hours

Workshop 3: Governance and Legal Issues

Premise: Potential school operators need to determine early how they will govern and manage their schools -- who will make key policy and operating decisions, and how? In addition, they need to approach other operational issues with an awareness of legal constraints beyond the charter school laws. This session is split into two distinct parts, one that focuses on governance and one that provides an overview of legal issues to

consider as they plan their operations.

1. Goals:

To help participants make clear, thoughtful choices about governance structures.

To help participant anticipate legal issues that may impact their staffing, facilities, special education and other operational areas. (You may decide to handle some of these issues in greater depth in other sessions.)

To ensure that participants understand the basic legal structure of charter schools in their state, including how to form the school as a corporate or legal entity, if permitted or required by the charter law.

2. Process:

Speaker to provide overview of governance issues, options and implications.

Speaker to provide highlights and handouts of legal issues pertinent under state and federal law.

3. Tools/Materials from *Governance* and *Legal* sections.

Handouts outlining key legal issues relevant to your state.

Time required: 3 - 4 hours

Workshop 4: Finance

Premise: Getting and managing money is critical to the viability of schools. This workshop should help founders understand funding sources, uses and planning tools.

1. Goals:

To help participants understand what funding streams or grants are available from government and private sources.

To help participants understand their fiscal needs throughout the charter development and planning process.

To help participants begin considering the key financial planning and management tools they will need to employ.

To emphasize the importance and specific techniques of managing cash flow.

2. Process:

Speaker to discuss key sources of revenue and help participants learn to calculate revenues in different scenarios.

Speaker to introduce participants to key financial planning and management tools, including budget development, long-term planning, and financial controls.

Optional: group exercises to complete model financial planning worksheets.

3. Tools/Materials from *Finance* section.

Time required: 3 - 4 hours

Workshop 5: Community and Parent Relations

Premise: Managing the school's relationship with parents, students and others in the community is critical to gaining and building a better school. This workshop focuses on the many facets of those relationships and offers tips for identifying and interacting with stakeholders.

1. Goal:

To help participants identify and work with key stakeholders in both the start-up and ongoing operational phases, including marketing their school to prospective students and their families.

2. Process:

Speaker and handouts on parent, community, media and student relations.

3. Tools/Materials in *Parent and Community Relations* and *Enrollment* sections.

Time required: 3 hours

Other Critical Topics:

Curriculum, Facilities, Staffing/Operations, Special Education

Premise: No one doubts that these are vital topics for charter school

planners, but workshop organizers have found it challenging to design helpful, replicable workshops on them. These are areas where you will need to do some significant workshop design yourself, though some tools are provided in this Sourcebook.

1. Goal:

To help participants understand options to consider, resources they can tap to learn more, legal considerations, and likely problems and solutions.

2. Process:

On curriculum, speakers can present options and point planners toward sources of additional information. Note that the goal here is to offer resources rather than to promote a particular curriculum.

On facilities, speakers can present different types of facilities charter schools can consider, ways to finance facilities, legal issues (such as building codes), and problems that may arise in the development of a facility.

On staffing and operations, speakers can suggest ways for charter planners to determine the types of staff and support systems they will need, review legal issues, and highlight common staffing and operational problems that arise and ways to prevent or respond to them.

On special education, speakers can inform participants about the advance planning they need to do (in their budgets, etc.) and explore ways to be creative in meeting special students' needs (e.g., partnering with local districts for some resources). This is a topic many experienced workshop organizers are planning to expand in the future, so consider devoting significant time and effort to this one.

3. Tools/Materials in *Curriculum & Instruction* , *Staffing* , *Facilities* and *Special Education* sections.

Time required: 4 - 12 hours, depending on depth of coverage in each area

Final Workshop: The Application Process

Premise: Participants who complete the preceding workshops and do the

follow-up work suggested will have the chief ingredients for completing most charter applications. But they will still need to take that raw material and make it fit the specific requirements of the application process. This workshop should be tailored to the unique application and chartering process in your state.

1. Goal:

To help participants understand the application content requirements and timing.

2. Process:

Speaker to walk through key steps in application process.

3. Tools/Materials should include your state's charter school application materials.

Time required: 2 - 3 hours

2. Speakers List

The following pages contain names and phone numbers of speakers who were recommended by one or more organizations as (1) outstanding in content and delivery and (2) appropriate for speaking in other states. These are speakers who may be worth bringing to your state if you can afford to bring in outside speakers and if similar local speakers are unavailable. *This list is not exhaustive; treat it as a starting point* . Many of these people are continuing to develop their experience and expertise and may be appropriate for additional topics in the future.

Some Recommended Speakers for Charter School Planning Workshops

NAME	AREAS OF EXPERTISE
Kevin Andrews Neighborhood House Charter School, MA 617/825-0703	Inspirational/keynote; Leads/founded charter school; mission and vision; governance
Laura Benedict Center for Community Self-Help, NC 919/956-4400	Facilities
Linda Brown Charter School Resource Center Pioneer Institute, MA 617/723-2277	Mission and vision; assessment and accountability
Barbara Buell, Atty. 617/254-4400	Laws; legal issues
Center on Learning, Assessment, and School Structure, NJ (various consultants) Contact person: Carol Wander, Office Mgr. 609/730-1199	Assessment and accountability
Yvonne Chan Vaughn Learning Center, CA 818/896-7461	Inspirational/keynote; leads/founded charter school; mission and vision; finance and fundraising; community relations
Jackie Clement, NH 603/643-5633	Mission and vision; governance
Howard Fuller Institute for the Transformation of Learning Marquette University, WI	Inspirational/keynote

414/288-5775	
Thelma Glynn NC Charter School Resource Center 919/682-1500	Staffing; enrollment and marketing
Helen Hawkins Founding Principal, Triumphant Charter Middle School, IL 773/918-0766	Inspirational/keynote; leads/founded charter school; mission and vision; curriculum and instruction
Sarah Howard and Michelle Smith Co-Founders and Teacher-Directors Acad. of Comm. & Tech Charter School, IL 773/626-4200	Inspirational/keynote; leads/founded charter school; mission and vision; curriculum and instruction
Wayne Jennings Designs for Learning, MN 612/644-5052 wayne@designlearn.com	Leads/founded charter school; mission and vision; assessment and accountability; curriculum and instruction; staffing
Katie Kelly Leadership for Quality Education, IL 312/853-3690	Facilities
Tom Kluepfel Elysian Charter School 201/876-0102	Leads/founded charter school
Lucy Knight Knight Consulting, IL 847/733-0736 lwknight@aol.com	Governance
Ledyard McFadden	Finance and fundraising

617/867-9099	
Lorraine Monroe Manhattan Institute, NY 212/885-6984	Inspirational/keynote; mission and vision
Deborah Montanino, DC Executive Director, Ellington Fund / Duke Ellington School of the Arts 202/333-2555	Finance and fundraising; community relations
Jerri Morrison Trenton Community Charter School, NJ 609/394-0068	Leads/founded charter school
Joe Nathan Center for School Change University of Minnesota 612/625-3506	Inspirational/keynote; laws; mission and vision; curriculum and fundraising; community relations
Peter Negroni, Superintendent Springfield Public Schools, MA 413/787-7087	Inspiratinal/keynote
Joe Neri Illinois Facilities Fund 312/629-0060	Governance; finance and fundraising; facilities
Jim Norris Constellation Community Middle School, CA 562/435-7181	Leads/founded charter school
Eric Premack Institute for Education Reform	Laws; mission and vision; assessment and accountability; governance; legal issues; finance and fundraising; staffing; facilities

California State University 916/278-4611	
Lori Scott Illinois Facilities Fund 312/629-0060	Finance and Fundraising
Don Shalvey, Supt. San Carlos School District (worked with charter schools) 650/508-7333	
Dee Thomas New Country School, MN 507/665-4033	Leads/founded charter school
Doug Thomas Center for School Change, MN school board member 507/248-3738	Leads/founded charter school; mission and vision; governance; community relations
Ann Connolly Tolkoff City on a Hill Charter School, MA 617/262-9836	Leads/founded charter school
Tyla Wells, MI Involved in founding of several technical-vocational schools 313/839-1883	Leads/founded charter school; finance and fundraising
Johnathan Williams Accelerated Charter School, CA 213/235-6343 jxavierwil@aol.com	Leads/founded charter school; mission and vision; curriculum and instruction

In addition, the leaders of the organizations who contributed to this sourcebook may serve as resources, in organ school workshops, in recommending speakers and as speakers themselves:

Linda Brown, Massachusetts Charter School Resource Center, 617/723-2277

Ken Campbell and Shirley Monastra, DC Committee on Public Education, 202/835-9011

Margeret Lin, Leadership for Quality Education, 312/853-1206

Eric Premack, Charter School Development Project, Institute for Education Reform, California State University, 91

Jeremy Resnick and Bruce Barron, Charter Schools Project at Duquesne University (PA), 412/396-4492

Sarah Tantillo, New Jersey Charter School Resource Center, 732/296-8379

3. Workshop Organizer Tools and Materials

The 500-page version of the Sourcebook includes hard copies of helpful workshop materials, example advertisements, agendas, workshop evaluation forms and similar tools.

Again, to order the complete version ($30.00 including postage and handling) contact the Friends Netw info@charterfriends.org

Background materials include:

1. D.C. Committee on Public Education (COPE)

Workshop series agenda (1 page)

Sample memo to speakers about issues to cover in workshop (4 pages)

Evaluation form (2 pages)

2. New Jersey Charter School Resource Center

Sample agendas/calendars from newsletter (2 pages)

Conference brochure and registration (2 pages)

Other sample agendas and announcements (4 pages)

3. Eric Premack's California Charter School Boot Camp

Agenda (2 pages)

Evaluation form (1 page)

Finance boot camp agenda (1 page)

4. Massachusetts Charter School Resource Center

Sample advertisement/registration sheets (2 pages)

Sample symposium agenda (1 page)

Socratic Dialogue materials (5 pages)

5. Institute for Economic Transformation (PA)

Roundtable descriptions (3 pages)

6. Leadership for Quality Education (Chicago)

Roundtable descriptions (2 pages)

Sample workshop agendas (2 pages)

Charter school fair agenda (1 page)

CPA involvement sheet (1 page)

Retreat agenda and summary of activities (4 pages)

Part B: Workshop Topics and Materials

This section of the detailed 500-page version of the Sourcebook provides hard copies of materia covered in planning workshops delivered by the six organizations that contributed to this sourcebc organized in the order presented in the model workshop in Part A.

Workshop Topics and Materials

1. General Planning Tools and Materials

a. *Chapter 1: Exploration* from Premack's Charter School Development Guide (4 pages)

b. *Appendix E: Startup Checklist* from Premack's Charter School Development Guide (3 p

c. Example organizing steps, "CSRC Guidelines for Charter Schools" (from M.A. C.S.R.C

d. *Leadership* chapter from The Massachusetts Charter School Handbook (5 pages)

e. Characteristics of an Effective School (from D.C. COPE) (2 pages)

f. *School Calendar and Schedule* and *Health, Safety, and Emergency Policies and Pl* from Premack's Charter School Development Guide (2 pages)

g. Chicago Charter School Planning Timeline (from Leadership for Quality Education) (11

2. Mission and Vision

a. *The Mission Statement* chapter from The Massachusetts Charter School Handbook (4 p

b. *Mission and Goals* section from What It Takes to Start a Pennsylvania Charter School

c. *Mission* section from Leadership for Quality Education's *Resource Guide* (1 page)

d. *Determining the Mission* from The Charter Challenge: A Handbook for Designing a Michigan Public School (6 pages)

e. *Future Trends* worksheet from Premack workshops

f. *Skills and Competencies* worksheet from Premack workshops

g. Examples:

- Neighborhood House (3 pages)

- City on a Hill (34 pages)

- Worcester (29 pages)

- Golden Door (4 pages)

3. Assessment and Accountability

a. *Assessment* chapter from The Massachusetts Charter School Handbook (6 pages)

b. *Student and School Assessment* section from Premack's Charter School Developm pages)

c. Sample standards goals from schools (provided by E. Premack) (12 pages)

d. Neighborhood House Accountability Plan I and II (38 pages)

e. Massachusetts Charter School Initiative Evaluation and Accountability Policy (15 pages

f. City on a Hill Annual Report (70 pages)

4. Governance

a. *Governance* section from Premack's Charter School Development Guide (2 pages)

b. Board member selection analysis table (N.J. C.S.R.C.) (2 pages)

c. Example by-laws from:

- Perspective Charter School (9 pages)

- City on a Hill (11 pages)

- Galloway Charter School (6 pages)

- The Neighborhood House (14 pages)

d. National Center for Nonprofit Boards brochures (8 pages)

5. Legal Issues

a. Charter Schools Legal Issues from USCS web page
(http://www.uscharterschool.org/tech_assist/ta_legal.htm) (4 pages)

b. The Red Flag List: Keeping Your Organization Out of Trouble (provided by D.C. C.O.P

c. Rules for tax exempt status as sub-entity of larger organization (I.R.S.) (5 pages)

d. Legal Status and incorporation section from Premack's Charter School Development Gu

6. Finance

a. *Finances and Budgeting* section from The Massachusetts Charter School Handbook (1

b. Chicago's Charter Schools Financial Spreadsheet (instructions, spreadsheet printout) (8 p

c. Impossible California Charter Elementary School Operations Planning Budget (Premack

d. Tables 1 and 2 from Premack's financial guide for California schools (this is not to b rather it is a model of what you may want to prepare for your state) (3 pages)

e. Perspectives on Development (fundraising tips) (provided by D.C. C.O.P.E.)(2 pages)

f. *Insurance* section from Premack's Charter School Development Guide (2 pages)

7. Curriculum and Instruction

a. Curriculum and Instruction section from US Charter Schools web page

(http://www.uscharterschools.org/tech_assist/ta_curric.htm#top) (9 pages)

b. Education week website (http://www.edweek.org) (1 page)

c. Curriculum, Instruction, and Assessment section from Premack's Charter School Develc (4 pages)

d. Curriculum section from The Massachusetts Charter School Handbook (7 pages)

8. Staffing

a. *School Organization and Staffing* section from Premack's Charter School Developm pages)

b. Neighborhood House interview and hire materials (14 pages)

c. South Shore Charter School personnel policies (4 pages)

d. Responsibilities of a Charter School Business Manager/Director of Operations (prov C.S.R.C.) (1 page)

e. Sample workplace harassment policy (provided by N.J. C.S.R.C.) (3 pages)

f. Sample sexual harassment policy from Perspectives Charter School (2 pages)

g. Sample employment policy from Perspectives Charter School (2 pages)

9. Facilities

a. *Facilities* section from The Massachusetts Charter School Handbook (2 pages)

b. *Facilities and Support Services* section from Premack's Charter School Developm pages)

c. *Facilities* section from Leadership for Quality Education's *Resource Guide* (6 pages)

10. Parent and Community Relations

a. Publics Relations: Talking to the Press (N.J. C.S.R.C.) (1 page)

b. Parent/Community Involvement Opportunities (N.J. C.S.R.C.) (1 page)

c. Recruiting a Cross-Section of the Community (N.J. C.S.R.C.) (1 page)

d. *Students, Parents and Community* and *Parental Involvement Strategies and Polic* from Premack's Charter School Development Guide (3 pages)

e. Neighborhood House Family Learning Contract (3 pages)

11. Enrollment

a. Recruiting a Cross-Section of the Community (N.J. C.S.R.C.) (1 page)

b. *Students, Parents and Community* section from Premack's Charter School Developm pages)

12. Special Education

a. *Charter Schools and Special Education: A Handbook* by Cheryl M. Lange, Ph contents. Full document (more than 100 pages) available on U.S. Department of Edu school website at http://www.uscharterschools.org. (4 pages)

To order a copy of the full 500-page version of the Sourcebook for School planning workshops ($30.(postage and handling) contact the Friends Network at info@charterfriends.org

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